

TO: Distribution

FROM: Marketing Information & Analysis/Bruce Neidle

SUBJECT: NIELSEN WEEKLY C-STORE TRACKING REPORT

DATE: September 21, 1993

The following report is based on the weekly Nielsen C-store audit service with data through w/e 9/4/93.

Please note, beginning with this week's report, data is provided on the percent of stores with a promotion. This data is segmented by type of promotion offered including: Free Goods (i.e. B1G1F's), Incentives (i.e. Buy 1 pack get a free cap), Money Off deals (ICR's and buy down stickers) and Other (refund offers, sweepstakes and mail-in offers).

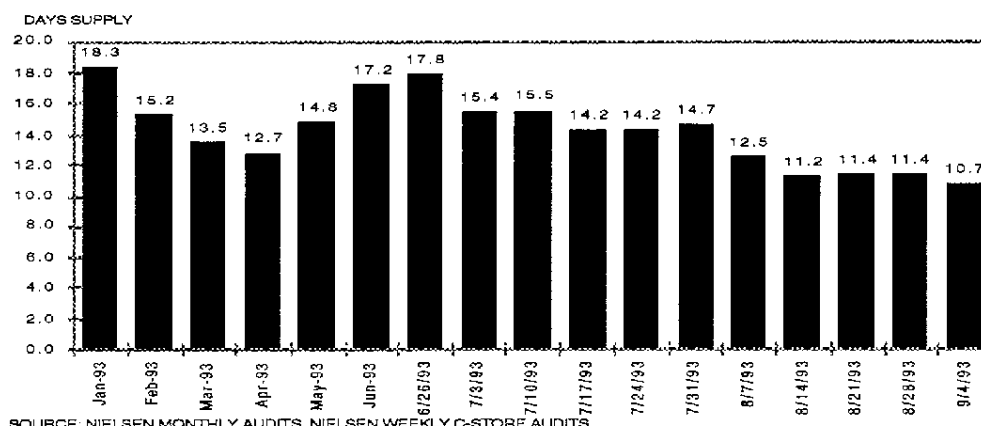
KEY FINDINGS

- During the first four weeks of the Price Reduction Program (PRP), PM's share advanced +0.1 points versus four weeks-ago to 46.9%, with positive performance by Marlboro (+0.2) and PM's OPB's (+0.1) partially offset by a loss to PM's discount entries.
- On a weekly basis, Marlboro realized a +0.7 point gain versus week-ago to 29.3%, its highest level since the end of July. Marlboro's average retail price remained fairly stable during the last four weeks, ranging from \$1.87 and \$1.90 per pack.
- Marlboro's average days supply (10.7 days) and share of total inventory (15.2%) continued to decline, falling -4.0 days and -4.1 points respectively from end of July levels, as retailers adjust their inventories during the transition from MLP to PRP.
- Winston realized its seventh weekly share gain in the last eight periods, advancing +0.2 points versus week-ago and +1.6 points since the w/e 7/10. Driven by B1G1F offers, nearly 35% of Winston's total volume is now derived from Select packings (versus only 9% the w/e 7/10). During its sixth week at retail, Winston Select Lights' share reached 1.2% (+0.3 versus week-ago), with 55% of stores stocking this line extension.
- Camel Filter posted a +0.3 point week-to-week share gain and +0.4 points in the last two weeks to 4.0%. The franchise is likely benefiting from increased free product offers, with the percent of stores offering a B1G1F (9%) or B2G1F (14%) nearly doubling in the last four weeks (note, 2% of stores offered both deals).
- The Discount category experienced its fourth consecutive week-to-week share loss, declining -0.9 points versus week-ago and -2.4 points since the start of PRP. PM's and RJR's Deep Discount products accounted for the majority of this loss, with each company declining -0.9 points since the w/e 8/7.
- Following three consecutive week-to-week share declines, Basic advanced +0.15 points versus week-ago to 5.9% with the percent of stores stocking the brand expanding to 77%.
- The average (volume weighted) Premium pack price has declined -24¢ in the last four weeks to \$1.89. The average price gap between Branded and Deep Discount products narrowed to 12¢ this week (from 41¢ the w/e 8/7), reflecting the partial collapse of the middle price tier.

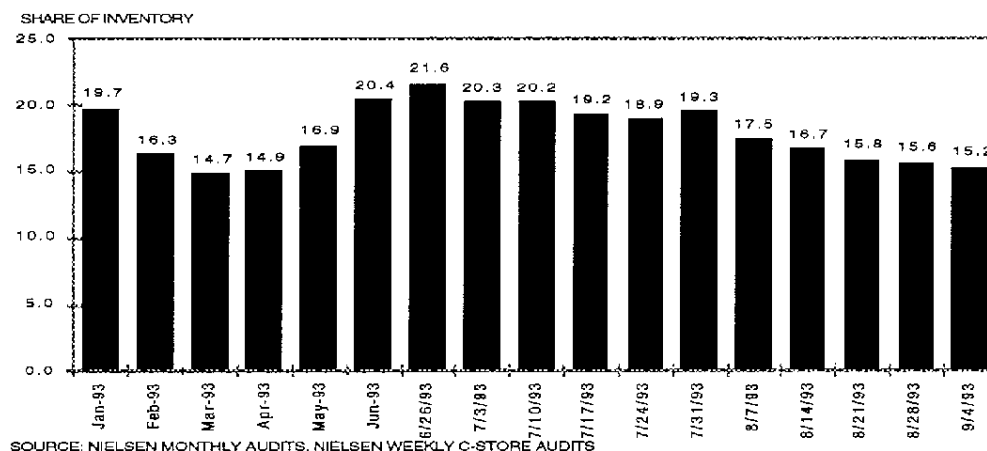
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MARLBORO'S AVERAGE DAY'S SUPPLY AT RETAIL DECLINED - 0.7 DAYS VERSUS WEEK-AGO AND -4.0 DAYS SINCE THE W/E 7/31.



MARLBORO'S SHARE OF TOTAL INVENTORY CONTINUES TO DECLINE, FALLING -4.1 POINTS SINCE THE END OF JULY.



Distribution:

R. Anise	N. Ellis	J. Kiernan	J. Mortensen (R5)	A. Schwartz
M. Anton	C. Finch (R3)	R. King	C. Murray	R. Simons
D. Ball	E. Fitzgerald	M. Klein	M. Murphy	A. Sinha
T. Beane	S. Fuller	L. Lembo	W. Murray	V. Shavers
D. Beran	T. Garguilo	S. Levan	D. Nelson (R1)	C. Shore
D. Berenson	E. Gawronski	C. Levy	J. Nelson	J. Spector
G. Bible	E. Gee	B. Lewis	T. Nelson	D. Stern
B. Bittner	A. Goldfarb	J. Lichtman	B. O'Brien	N. Suter
G. Blumenson	J. Greene	H. Long	R. Olsen (R4)	M. Szymanczyk
J. Bonhomme	H. Harwood	H. Lu	V. Penninti	J. Taylor
W. Campbell	P. Henriques	N. Lund	S. Piskor	J. Turner
J. Chaump	J. Heironimus	M. Mahan	J. Raporte	S. Vazquez
J. Clary (R2)	K. Houghton	A. Marrullier	M. Rolnick	I. Weinkselbaum
C. Cohen	J. Isaacs	R. Mikulay	S. Rush	B. Weinstein
S. Darrah	S. Jannetta	D. Miller	T. Saloun	L. Wexler
N. Davis	C. Johnson	K. Miller	M. Schroeder	R. Whalen
G. D'Alessandro	L. Johnson	M. Moore	B. Schuyler	
K. Eisen	E. Joyce	J. Morgan	C. Schwab	

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